

WISCONSIN DEPARTMENT OF HEALTH AND FAMILY SERVICES
Division of Health Care Financing
1 W. Wilson St.
Madison WI 53702

To: Process Help Handbook Users

From: Jim Jones, Director
Bureau of Eligibility Management

Re: **Process Help Release 05-06**

Release Date: October 1, 2005

Effective Date: October 1, 2005

EFFECTIVE DATE

The following process additions or changes are effective 10/01/05, unless otherwise noted. **Bold text in the new process section denotes new text. Text with a strike through it in the old process section denotes deleted text.**

Changes

**3.6.2 Ongoing Case
Maintenance>View/Query
History>Viewing Historical
Information Examples**

An example was added to explain "Sequence Updated on or Before" field.

**4.1.2 Reviews>Review Driver
Flow>Update Information**

This section has been added:

Reminder: The "Begin Month" field on individual pages should not be updated unless the information or verification on that page is being updated. The new "Begin Month" entered is the month CARES will begin using the new information to determine eligibility. At Review, the "Begin Month" field should be updated on any page with information required to be updated at review, such as income and expenses.

Some of the non-financial summary pages will be scheduled instead of detail pages in the Review Driver Flow. This is to allow you to review the current information to assess whether or not any changes need to be recorded, without having to go through the time consuming process of viewing each detailed record one by one. If you determine something needs to be changed, simply click on the "magnifying glass" icon to go to that particular detail record.

Summary Pages in the Review Driver

Detail Page	Accessed from
Household Members	Case Information Summary
Household Relationships	Case Information Summary
Permanent Demographics	Individual Demographics Summary
Current Demographics	Individual Demographics Summary
Benefits Received	Benefits / School Summary

Gatepost pages are displayed and answers are “blanked” out, you must ask these questions of your customers. If a yes response is noted, a corresponding detail page will be scheduled.

**4.1.3 Reviews> Review Driver
Flow>Start the Review
Process**

This section has been added:

New Process:

Note: You do not need to always update the begin month and the program filing dates on the request pages at review.

Update the Begin Month and the Program Filing Date only:

- If there is another type of change to the request page or if it is truly a new request.
- If the change to a program request is from a No to Yes at the group or individual level, then the date must be changed. Not changing the date will result in an error message that states, “Please update the ‘Begin Month’ and ‘Program Filing Date’ in order to run eligibility successfully.”
- If the change involves adding a person to the case, then you should also change the dates, as now the request page has changed to include the new person.

If you are only running a review and not changing anything on the Program Request pages, these dates will not need to be changed.

42 Simulation

This chapter has been added.

46 Tools>Case Comments

This chapter has been rewritten and expanded, incorporating many items from the Case Comments Self Study guide.

**57.1.2 Other> Driver Flows>
Multiple Driver Flows**

This section was added.

New Process:

Drivers schedule pages. For example, if a Review Driver schedules pages 2, 4, 6, 8 and 10 and a worker starts a Person Add Driver after completing page 4, the next scheduled page for either driver is scheduled. Lets say, a Person Add Driver schedules page 1, 3, 5, 7, and 9. Pages 1 and 3 would be scheduled next, after page 4, then pages, 5,6,7,8,9, and 10 would be scheduled in this example so that all scheduled pages for all invoked drivers appear in order.